

Five Tips For Building a High-Performance Schedule

By Roger P. Levin, DDS

Introduction

The scene is an orthodontist's office. The time is now. The location could be anywhere...

- 9:15 a.m.: *Amanda* is due for an adjustment. She doesn't show.
- 9:35 a.m.: *Amanda's* mother calls to say that her daughter will not be able to make her appointment. Because *Amanda's* sister has been a recent patient, the front desk says nothing about failing to notify the office ahead of time and reschedules her for the following week at 10:30.
- 11:00 a.m.: *Billy* arrives 20 minutes late for his records appointment. *Billy's* mother casually informs the front desk that they left their house late. The front desk person says nothing further about the matter and *Billy* is taken to the back.
- 11:30 a.m.: *Ms. Williams* arrives on time for her appointment for debonding. Unfortunately, *Billy's* late arrival has altered the schedule and she is asked to wait.
- 11: 50 a.m.: Unwilling or unable to wait any longer, *Ms. Williams* cancels and declines to re-schedule before leaving the office.

The following week:

- 10: 50 a.m.: *Amanda* arrives for her 10:30 appointment, re-scheduled from the previous week. Many pleasantries are exchanged because *Amanda's* mother knows the staff well. The front desk once again says nothing about her tardiness and sends her back for her adjustment.
- 11:00 a.m.: *Susan* arrives for a records appointment. Unfortunately, the schedule is running behind. She and her mother must wait... and wait.

... And so it goes. These kinds of trials and tribulations contribute to a chaotic ortho schedule and that is a major problem. Chaos leads to stress and decreased productivity—not something you want to experience in a down economy. Scheduling is the most critical operational system in any orthodontic practice. In fact, effective practice management means that all other systems in the practice must integrate well with the schedule. The simple fact is that production will be more dependent on the scheduling system than any other single system in the ortho practice.

At its core, scheduling is really about the efficient use of the orthodontist's and staff member's time. The first step in evaluating the daily schedule is to determine how time is used by each team member. Are there opportunities to increase efficiency and productivity for the front office team, the assistants and the orthodontist? The answer is usually *yes*. Most practices can improve efficiency and reduce stress by redesigning the scheduling system.

Ortho Power Cell Scheduling™

No other dental specialty sees nearly as many patients in a day as an orthodontist does. Consequently, no other specialist is as dependent on a highly efficient schedule. Using data gathered from hundreds of orthodontic practices over the past 23 years, Levin Group has developed Ortho Power Cell Scheduling™, which includes the following action steps:

1. Design a scheduling template

Understanding how each day should operate is the basis for creating a scheduling template. Levin Group recommends that each day have a similar structure. Mornings should be reserved for more involved appointments such as records appointments and debonds. Get the tough stuff out of the way first when everyone in the office is “fresh.” Save the afternoon more for adjustments. Doing so goes a long way toward easing doctor and staff fatigue levels.

2. Set the annual production goal

Determine the annual production goal. Levin Group recommends that each year the goal be set approximately 15 percent higher than the previous year. A practice that is growing less than 15 percent a year is in danger of flattening out. In that event, the orthodontist should evaluate the potential causes such as insurance participation, declining reimbursement in insurance plans, or lower GP and patient referrals.

3. Establish the daily production goal

Divide the total annual production goal by the number of days the practice will be available to treat patients. This determines the daily goal for each practice. For example, if the practice is to produce \$5,000 a day, every aspect of the scheduling system must be geared toward making this happen. This process lessens the chance that particular variables will result in a practice downturn. These variables can include lower patient flow, a decrease in case acceptance, or the loss of referring doctors.

4. Stop using 15-minute units!

Many practices are still using 15-minute units for their schedules. Inaccurate scheduling can cost a practice approximately 12-15 days of lost treatment time every year. By shifting to 10-minute increments, practices can schedule patients more accurately. For example, some patients may only require a 20-minute adjustment appointment instead of 30 minutes. In schedules that use 15-minute units, a 20-minute appointment must either be under-scheduled or over-scheduled.

5. Script everything!

To properly serve the needs of all patients, front desk personnel and other key team members should receive verbal skills training. The ortho practice should provide scripting on building value for each appointment, confirming appointments two days in advance, and communicating to patients that the schedule has been designed to serve not only their unique needs, but also the needs of all other patients.

Conclusion

Would you want a daily schedule like the one at the beginning of this article? No, of course not. A consistently inefficient schedule is often the greatest source of stress for orthodontic practices. Revamping your scheduling system is all it takes to eliminate those inefficiencies and creating a better day for patients and the practice alike.

The five action steps of Ortho Power Cell Scheduling™ can help you redesign your schedule and move you closer to reaching total ortho success!

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